



TransactIQ Team Iteration Two

Meet the Team

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Client Company



Mentor Feedback

- Need paging on our table
 - More user friendly

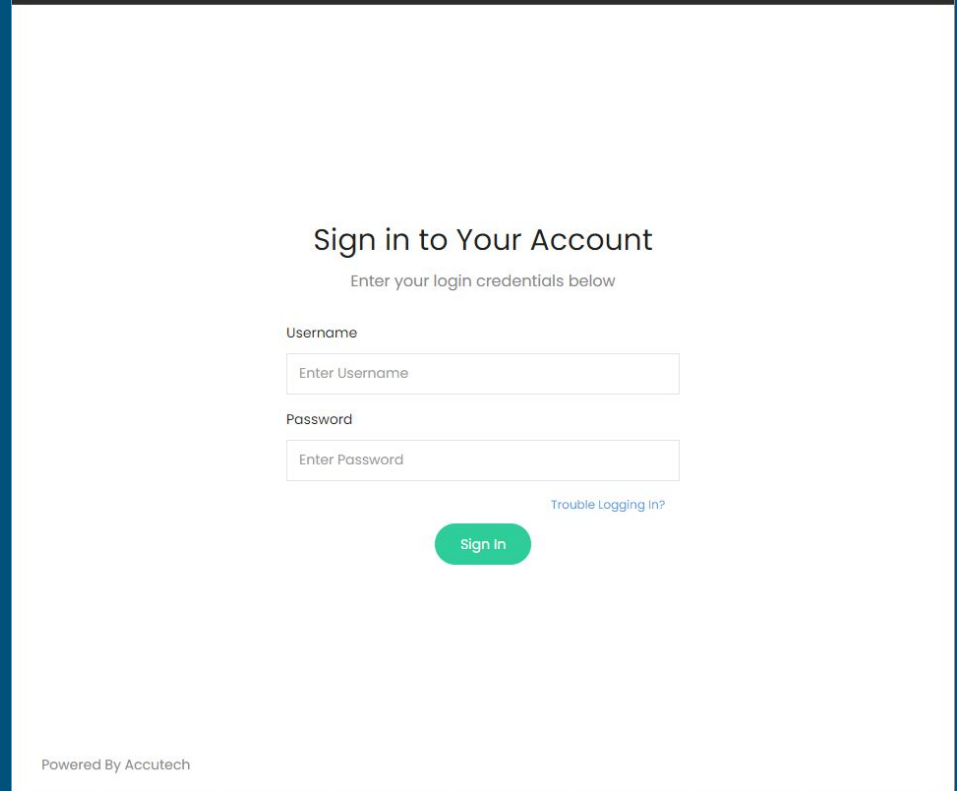
Client Feedback

- More user feedback on the page
- Would like to see loading animation when entering in data

Feature 1 - Login System

Started on our own ->

We moved to use Accutech's
template project that has a SSO
login system



The screenshot shows a clean, white login interface. At the top, the heading "Sign in to Your Account" is centered, followed by the instruction "Enter your login credentials below". Below this, there are two input fields: "Username" and "Password". Each field has a placeholder text "Enter Username" and "Enter Password" respectively. To the right of the password field, there is a link "Trouble Logging In?". At the bottom center, there is a green "Sign In" button. The footer of the page reads "Powered By Accutech".

Sign in to Your Account

Enter your login credentials below

Username

Enter Username

Password

Enter Password

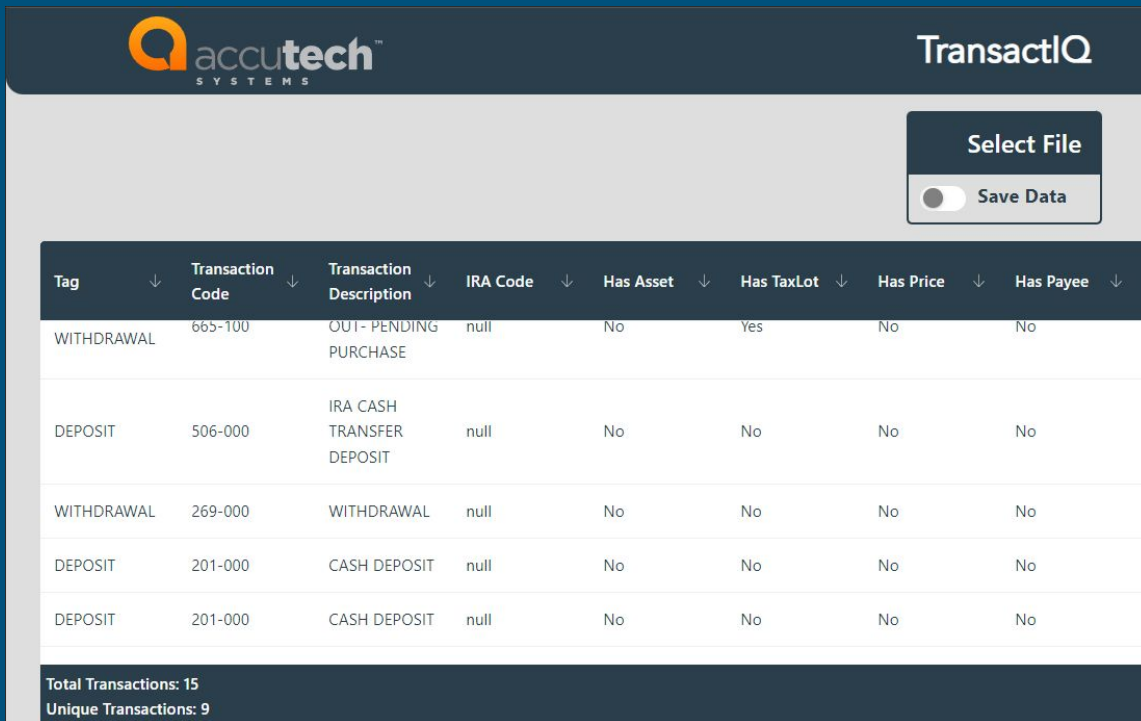
[Trouble Logging In?](#)

Sign In

Powered By Accutech

Feature 2 - Category Suggestion

Using a decision tree
we suggest a primary
transaction category



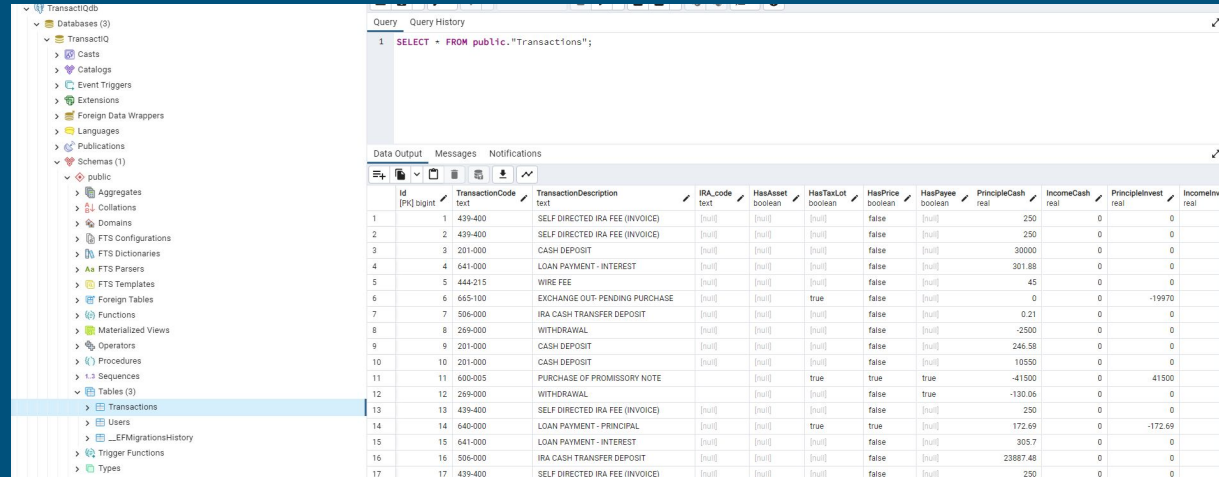
The screenshot displays the TransactIQ interface. At the top, the 'accutech SYSTEMS' logo is on the left and 'TransactIQ' is on the right. Below the logo, there is a 'Select File' button and a 'Save Data' toggle switch. The main part of the interface is a table with columns: Tag, Transaction Code, Transaction Description, IRA Code, Has Asset, Has TaxLot, Has Price, and Has Payee. Each column has a downward arrow icon. The table contains five rows of transaction data. At the bottom, a summary bar shows 'Total Transactions: 15' and 'Unique Transactions: 9'.

Tag	Transaction Code	Transaction Description	IRA Code	Has Asset	Has TaxLot	Has Price	Has Payee
WITHDRAWAL	665-100	OUT- PENDING PURCHASE	null	No	Yes	No	No
DEPOSIT	506-000	IRA CASH TRANSFER DEPOSIT	null	No	No	No	No
WITHDRAWAL	269-000	WITHDRAWAL	null	No	No	No	No
DEPOSIT	201-000	CASH DEPOSIT	null	No	No	No	No
DEPOSIT	201-000	CASH DEPOSIT	null	No	No	No	No

Total Transactions: 15
Unique Transactions: 9

Feature 3 - Database Connection

Inputted data is saved to a
PostgreSQL database



The screenshot displays a database management interface. On the left, a tree view shows the database structure, including 'Databases (3)', 'TransactionIQ', and 'public'. The 'public' schema is expanded, showing various database objects. The main area shows a query window with the following SQL statement:

```
1 SELECT * FROM public."Transactions";
```

Below the query window, the 'Data Output' tab is active, displaying a table with 17 rows and 12 columns. The columns are: Id, [PK] digit, TransactionCode, TransactionDescription, IRA_code, HasAsset, HasTaxLot, HasPrice, HasPayee, PrincipleCash, IncomeCash, PrincipleInvest, and IncomeInv.

Id	[PK] digit	TransactionCode	TransactionDescription	IRA_code	HasAsset	HasTaxLot	HasPrice	HasPayee	PrincipleCash	IncomeCash	PrincipleInvest	IncomeInv
1	1	439-400	SELF DIRECTED IRA FEE (INVOICE)	[null]	[null]	[null]	false	[null]	250	0	0	0
2	2	439-400	SELF DIRECTED IRA FEE (INVOICE)	[null]	[null]	[null]	false	[null]	250	0	0	0
3	3	201-000	CASH DEPOSIT	[null]	[null]	[null]	false	[null]	30000	0	0	0
4	4	641-000	LOAN PAYMENT - INTEREST	[null]	[null]	[null]	false	[null]	301.88	0	0	0
5	5	444-215	WIRE FEE	[null]	[null]	[null]	false	[null]	45	0	0	0
6	6	665-100	EXCHANGE OUT-PENDING PURCHASE	[null]	[null]	true	false	[null]	0.21	0	-19970	0
7	7	506-000	IRA CASH TRANSFER DEPOSIT	[null]	[null]	[null]	false	[null]	-2500	0	0	0
8	8	269-000	WITHDRAWAL	[null]	[null]	[null]	false	[null]	246.58	0	0	0
9	9	201-000	CASH DEPOSIT	[null]	[null]	[null]	false	[null]	10550	0	0	0
10	10	201-000	CASH DEPOSIT	[null]	[null]	[null]	false	[null]	10550	0	0	0
11	11	600-005	PURCHASE OF PROMISSORY NOTE	[null]	[null]	true	true	true	-41500	0	41500	0
12	12	269-000	WITHDRAWAL	[null]	[null]	[null]	false	true	-130.06	0	0	0
13	13	439-400	SELF DIRECTED IRA FEE (INVOICE)	[null]	[null]	[null]	false	[null]	250	0	0	0
14	14	640-000	LOAN PAYMENT - PRINCIPAL	[null]	[null]	true	true	[null]	172.69	0	-172.69	0
15	15	641-000	LOAN PAYMENT - INTEREST	[null]	[null]	[null]	false	[null]	305.7	0	0	0
16	16	506-000	IRA CASH TRANSFER DEPOSIT	[null]	[null]	[null]	false	[null]	23887.48	0	0	0
17	17	439-400	SELF DIRECTED IRA FEE (INVOICE)	[null]	[null]	[null]	false	[null]	250	0	0	0

Planned Iteration Three Features

- Data classification
 - HeatMap
- User feedback
- Machine learning pattern



Demonstration